

# Managing Customers

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## Managing Customers

You have to take good care of your customers. That means making sure their profile contains all the information you need to have a package shipped to them, following up on their support requests, creating special discount groups, knowing which orders have been completed and which have been abandoned, and much more.

The "Customers" tab allows you to follow the creation of user accounts on your site.

ID	Gender	Last Name	First name	E-mail address	Age	Enabled	News.	Opt.	Registration	Connection	Actions
1		DOE	John	pub@prestashop.com...	41	✓	✓	✓	2011-06-01	2011-06-01 15:33:15	

You can edit the account information for each of your customers, and even disable them, by clicking on the green checkmark or red "X", in the table shown. You can enable or disable an account, subscribe or unsubscribe them to an e-mail list, or subscribe or unsubscribe a customer from the e-mail list of a partner group.

### Customers options

At the bottom of the tab, you can find a "Customers options" section with a single option: "Regenerate password". You can choose to limit the frequency at which a customer can generate a new password for his or her account. By default, it is set at 360 minutes – 6 hours.

Customers options

Regenerate password:  minutes

Minimum time before requesting a new password

One last section is available: "Set required fields for this section". Clicking the link opens a form where you can select additional fields to mark as required when a user creates an account.

 Set required fields for this section

**Required Fields**

Select the fields you would like to be required for this section.

<input type="checkbox"/>	Field Name
<input type="checkbox"/>	gender
<input type="checkbox"/>	birthday
<input type="checkbox"/>	newsletter
<input type="checkbox"/>	optin

[Save](#)

### Creating a new user

To create a user account manually, select "Add New". A form appears, requesting information about the customer.

**Customer**

**Gender:**  Male  Female  Unknown

**Last name:**  \*

**First name:**  \*

**Password:**  \*  
5 characters min., only letters, numbers, or -\_

**E-mail address:**  \*

**Birthday:** -  -  -

**Status:**     
Allow or disallow this customer to log in

**Newsletter:**     
Customer will receive your newsletter via e-mail

**Opt-in:**     
Customer will receive your ads via e-mail

**Default group:**     
Apply non-cumulative rules (e.g., price, display method, reduction)

**Groups:**

<input type="checkbox"/>	ID	Group name
<input type="checkbox"/>	1	Default
<input type="checkbox"/>	2	Belges cools

Check all the box(es) of groups of which the customer is to be a member \*

\* Required field

Fill out the customer's information and choose a password, at least 5 characters long. Type in the e-mail address and choose the date of birth. Choose whether or not this customer has the right to log in, whether or not he is subscribed to your newsletter, and finally, if he accepts to receive advertisements from your partners. Assign your customer to a group so that he may receive certain benefits. We will learn more about groups later in this section.

### Consulting a Customer's Information

In the case that you would like to have more information on a given customer, you can click on the "view" button. You will see this button at the end of the row in the customer's list. A new page will appear.

**John DOE**

[pub@prestashop.com](mailto:pub@prestashop.com)

ID: 000001  
 Registration date: 2011-06-01 15:33:15  
 Last visit: 2011-06-01 15:33:15

Newsletter:

Opt-in:

Age: 41 (1970-01-15)

Last update: 2011-06-09 09:53:02  
 Status:

**Add a private note**

This note will be displayed to all the employees but not to the customer.

**Messages (0)**

John DOE has never contacted you.

**Groups (1)**

ID	Name	Actions
1	Default	

**Orders (1)**

**Invalid orders: 1**

ID	Date	Products	Total paid	Payment	State	Actions
1	2011-06-01	2	625,98 €	Chèque	Awaiting cheque payment	

**Addresses (1)**

Company	Name	Address	Country	Phone number(s)	Actions
My Company	John DOE	16, Main street 2nd floor 75000 Paris	France	0102030405	

**Discounts (0)**

John DOE has no discount vouchers.

**Carts (1)**

ID	Date	Total	Carrier	Actions
000001	2011-06-01 15:33:15	626,37 €	My carrier	

**Products (2)**

7	iPod touch	
9	Shure SE210 Sound-Isolating Earphones for iPod and iPhone	

**Last connections**

Date	Pages viewed	Total time	Origin	IP Address
2011-06-01 15:33:15	0		prestashop.com	127.0.0.1

The various sections provide you with some key data on the user:

- Customer information, first and last name, e-mail address, sex, sign-up date, last site visit.
- Information regarding his subscription to the store's newsletter and subscription to ads from partnering companies, his age, date of last update, and whether or not the account is active.
- Private notes from the store's employees (i.e. you or your team)
- Messages sent by the customer to the store's team.
- The group to which the customer belongs.
- Summary of customer's past purchases. Amount spent, type of payment, order status. For more information about each order, click on the button in the "Actions" column.

- Entered addresses.
- Available vouchers.
- When your customer is on your site, you can see what he is adding to his cart in real time.
- Previous connection to the shop.

## Addresses

By clicking on the "Addresses" sub-tab you will have access to the list of your customer's home addresses. You can edit them using the "Edit" button, or delete them altogether.

[+ Add new](#)

Page 1 / 1 | Display  / 1 result(s) [Reset](#) [Filter](#)

ID	First name	Last name	Address	Postcode/ Zip Code	City	Country	Actions
--	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	--
2	John	DOE	16, Main street	75000	Paris	France	<a href="#">Edit</a> <a href="#">Delete</a>

[Delete selection](#)

[+ Set required fields for this section](#)

You also have the possibility to create them yourself with the "Add New" button.

Below the addresses table is a button, titled "Set required fields for this section". This gives you access to a form where you can indicate if a database field is necessary or not by checking the appropriate boxes, and clicking "Save" once you're done.

 Set required fields for this section

**Required Fields**

Select the fields you would like to be required for this section.

<input type="checkbox"/>	Field Name
<input checked="" type="checkbox"/>	id_state
<input checked="" type="checkbox"/>	id_customer
<input type="checkbox"/>	id_manufacturer
<input type="checkbox"/>	id_supplier
<input type="checkbox"/>	company
<input checked="" type="checkbox"/>	address2
<input checked="" type="checkbox"/>	postcode
<input type="checkbox"/>	other
<input type="checkbox"/>	phone
<input checked="" type="checkbox"/>	phone_mobile
<input type="checkbox"/>	vat_number
<input type="checkbox"/>	dni
<input type="checkbox"/>	date_add
<input type="checkbox"/>	date_upd
<input type="checkbox"/>	active
<input type="checkbox"/>	deleted

[Save](#)

## Groups

PrestaShop gives you the ability to offer your customers certain privileges, by assigning them to Groups. You can create as many customer groups as you like.

To use this feature, click on the "Groups" sub-tab. The page below will appear.

By default, only one group is defined, "Default". It applies to all users.

Page 1 / 1 | Display 50 / 2 result(s) Reset Filter

ID	Name	Discount	Members	Creation date	Actions
-				From To	-
1	Default	0.00	1	2011-06-01	
3	My buddies	50.00	0	2011-06-09	

[Delete selection](#)

To create more groups, click the "Add New" button: you will get a creation form.

**Group**

**Name:**  \*

**Discount:**  %  
Will automatically apply this value as a discount on ALL shop's products for this group's members.

**Price display method:**    
How the prices are displayed on order summary for this customer group (tax included or excluded).

[Save](#)

\* Required field

- In the "Name" field, indicate the name that you would like to give this group.
- In the "Discount" reduction, indicate the discount to apply to members of this group for all products.
- PrestaShop is frequently used in the Business to Business (B2B) sector. Therefore, you can create a group of customers who can buy products without paying the tax. The "Price Display Method" drop-down menu gives you a choice between "tax included" and "tax excluded".
- Validate your settings by clicking "Save".

You can add a customer to a group of your choice by clicking on the Edit icon on the corresponding line. Then, on the "Groups" table, select the group to which you want your customer to belong.

### Searching for a Customer

Searching for a customer on your PrestaShop store can be done two different ways.

**The first method** is to enter the information you have into the PrestaShop search bar, which is found in the top left of your Back Office. You can indicate:

- ID (the numbers that is assigned to the customer in the database).
- First or last name.
- E-mail address.

[Search](#)

Select "customers" from the drop-down menu and then click "Search".

The results, if any, are then presented.

**Search results**

1 customer found with "john"

ID	Sex	Name	e-mail	Birth date	Register date	Orders	Status	Actions
1		DOE John	pub@prestashop.com	1970-01-15	2011-06-01	1		

You can see ID, gender, e-mail, birthday, registration date, number of orders and whether or not the customer is active.

**The second method** consists of going to the customer tab, and listing all of your customers.

From there, you can complete the fields to filter your results according to the following criteria: ID, Sex, First Name, Last Name, e-mail address, age, registration date, subscription to the newsletter, subscription to partnering ads, last connection date. Enter your criteria and click the "Filter" button in the top right-hand corner of the table.

Page 1 / 1 | Display 50 / 1 result(s) Reset Filter

ID	Gender	Last Name	First name	E-mail address	Age	Enabled	News.	Opt.	Registration	Connection	Actions
--	<input type="text"/>	<input type="text"/>	john	<input type="text"/>	--	<input type="text"/>	<input type="text"/>	<input type="text"/>	From <input type="text"/> To <input type="text"/>	--	
1		DOE	John	pub@prestashop.com...	41				2011-06-01	2011-06-01 15:33:15	

Delete selection

Click the "Reset" button to go back to the complete list.

## Shopping Carts

PrestaShop contains some very powerful marketing features that enable you to see the products that customers are adding to their carts in real time. There are two ways to achieve this.

1. Consult their carts in detail directly from the customer information file by clicking on the button from the customer profile in the "carts" section.
2. Go to the "Carts" sub-tab, under the "Customer" tab. You will see all of the shopping carts that have items in them. For instance, you can filter your results by the date that they were added. You can see the profile of the customers who check your site out, and, if you wish, use this information to improve your commercial performance.

## John DOE - Cart #000001 from 2011-06-08 16:02:32



### Customer information

**John DOE (#1)**  
(pub@prestashop.com)

Account registered: 2011-06-01 15:33:15  
Valid orders placed: 0  
Total paid since registration: 0,00 €



### Order information

**Order #000001**

Made on: 2011-06-01 15:33:15



### Cart summary

Product	UP	Qty	Stock	Total
iPod touch	469,00 €	1	70	469,00 €
 Écouteurs à isolation sonore Shure SE210	149,00 €	1	1	149,00 €
<b>Total products:</b>				<b>618,00 €</b>
<b>Total shipping:</b>				<b>8,37 €</b>
<b>Total:</b>				<b>626,37 €</b>

According to the group of this customer, prices are printed: tax included.

In both cases, you can consult the details of a customer's shopping cart.

The most important information is presented in the "Cart Summary" section. You can see what products the customer purchased, the price of each item, the quantity they desire, and the total value of their cart.